



Crown Benefits

Small Business Retirement Plan Specialists

Tel (800) 269-1447

www.crownbenefits.com

Company Profile

A Proven Track Record in Third Party Administration of Retirement & Pension Plans

Crown Benefits is a full service actuarial and pension administration firm co-founded by industry veteran Dianna Simmons. With over 40+ years of experience in providing high quality consulting and reporting, Dianna understands that accessibility and responsiveness are critical in selecting a firm to administer your benefits plan. The Crown Benefits team strives for lasting and positive relationships with our clients. We recognize that being available to promptly answer questions and address concerns is of vital importance.

Crown Benefits supports its financial advisors by offering objective consulting as well as expert plan design and administrative services. We do not sell or recommend investments or insurance products. Our focus is strictly on retirement plan administration.

Our Services

EXPERT PLAN DESIGN AND ADMINISTRATIVE SERVICES

Our retirement plan design and administration services include a continuing commitment to effective communication with our clients.

FREE CONSULTING SERVICES

We provide free consulting services to our clients, including an illustration of an employer's plan design options to include contributions and benefit projections. We are prepared to help the business and its advisors decide on the appropriate plan for the company.

HANDS-ON SUPPORT

We guide our clients through all phases of plan design, takeover, installation, and ongoing administration.

Smart Ideas For Business Owners

If you are a business owner, you can take advantage of the recent tax law changes to accelerate your retirement savings and defer taxes. These opportunities include:

- ☀ "Owner-Only" Defined Benefit Plan: annual contributions as high as \$200,000
- ☀ Cross-Test Safe-Harbor 401(k) Plan: target owners and other key employees with higher allocation rates
- ☀ If you have an existing 401(k) Plan, you can enhance it by adding a Cash Balance Plan, allowing you to increase annual contributions by an additional \$200,000

Start Today - Free Proposal

To find out which retirement plan is right for you or your client, contact us. In one easy step, Crown will run a contribution illustration at no cost or obligation.

Call Today (800) 269-1447.